

## Helvetica launches investment foundation – OAK gives go ahead

Zurich, October 6, 2022 – The Occupational Pension Supervisory Commission (OPSC) has given its approval for the establishment of the Helvetica Life Investment Foundation. The launch of the "Swiss residential real estate" investment category is planned by the first quarter of 2023 in line with market developments.

The fund management company Helvetica Property Investors AG ("Helvetica" or "fund management company") will expand its product range in a strategic manner with the launch of the Helvetica Life investment foundation. With the "Swiss residential real estate" investment category, pension funds will have the opportunity to invest in a tax-free investment vehicle and to benefit from Helvetica's long-standing real estate expertise. The Board of Trustees and the management are convinced that they are offering pension funds with a long-term perspective an attractive investment opportunity with appealing returns. The robust economic data, the decline in construction activity over the last years as well as the high level of immigration continue to speak in favour of the Swiss real estate market in the future.

"We are monitoring market developments very closely. We expect a generally more cautious transaction policy, which should lead to a cooling off in the transaction market. However, we consider Swiss residential real estate to be crisis-resistant in the long term," comments Hans R. Holdener, co-founder and CEO of Helvetica.

Holdener adds: "We have always launched new products in a challenging market environment. However, with the return to interest rate normality and the ongoing market corrections, it seems to me that the current timing is very good for launching an investment foundation with a long-term focus."

The members of the Board of Trustees of the Helvetica Life Investment Foundation are proven real estate and pension fund experts: Dr. Andreas Spahni (Chairman), Chairman of the Board of Directors of various real estate investment vehicles with many years of experience in the real estate investment and development sector, Theodor Härtsch (Member and Vice Chairman), partner at Walder Wyss Attorneys at Law and member of various boards of directors in the financial and real estate sector, and Victor Meyer (Member), former partner at PwC, certified tax expert with more than 30 years of experience in finance and real estate.

Dr Andreas Spahni adds: "Helvetica has repeatedly proven that it can achieve sustainable growth even in a difficult market environment. A good example of this is the Helvetica Swiss Living Fund residential real estate fund, which has grown to over CHF 750 million in 2.5 years."

Dr. Spahni further comments, "To build a residential fund in such a challenging market environment while generating solid investment returns and attractive distributions is remarkable."

The investment foundation delegates the general management of the fund to the fund management company. Michael Knoflach, Deputy CFO and Head Controlling & Accounting, and Salman Baday, Head Sales & Marketing and Member of the Executive Board.

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All relevant documents can be found under [www.Helvetica.com](http://www.Helvetica.com).

### About Helvetica

Helvetica is a leading independent fund management company based in Zurich, offering first-class real estate investments and services. Helvetica creates sustainable added value for its clients through active, professional and long-term management of secure and stable Swiss real estate investments. Helvetica structures, manages and distributes collective real estate investments, in particular real estate funds in the segments of residential, commercial and industrial properties as well as special real estate, across a fully integrated value chain along the entire real estate life cycle. Its broad and loyal institutional client base includes banks, pension funds, insurance companies and asset managers. The firm is regulated and authorized by the Swiss Financial Market Supervisory Authority FINMA.

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